



ELECTRONIC medical records getting it right

By Janice Ahlstrom, CPHIMS, RN

the decision to implement an electronic medical record (EMR) is one of the most important decisions for your health care organization or physician practice. Nearly every business process is impacted with the implementation from registration/admission, scheduling, documentation, billing, patient follow-up, and internal and external communication. Considering the profound change this generates, you need a clear roadmap to ensure a successful transition to capitalize on the benefits.

Successful and effective implementation requires hard work, careful planning, and diligence. There are key elements to successful implementation from adoption approach, change management, process redesign, and testing of the application, hardware and interfaces. This article will focus on one area crucial to success, project planning and management.

Project planning and management: What should you do?

Best practice in management of an EMR implementation has a vendor project manager with broad knowledge of the EMR application working with a project manager (PM) from your organization to develop a comprehensive project charter, project plan, and communications plan. Both PMs should have experience with multi-department implementations. If the PM skill is not available in your organization, often, a third-party consultant project manager is hired to plan and manage the effort. When leveraging a consultant there should always be an internal leadership resource identified in your organization who will be mentored through out the implementation.

At the end of the EMR project, someone in your organization will need to own the support and management of the application. A consultant project manager that mentors an internal resource puts your organization on track for success. Too often, we see organizations struggle after an implementation because much of the knowledge walks out the door with the vendor team and the consultant.

A project charter defines and documents the what, how, who, when, where, and why of the project. The project charter articulates scope, approach, and clearly defined measures of success that help to manage expectations. The project communications plan defines the various meetings, communications, and reports used over the course of the project. The communications plan documents the content, context, audience, and intended yield of the various forms of communication.

The project plan is documented in project management software such as MS Project, thereby leveraging numerous time saving features. The project plan should document all project tasks: those for the vendor team, organization's team, and other vendors involved. The plan should encompass the entire project life cycle from kick off to transition of support services, identify critical milestones, define key dependencies, and be analyzed to identify risks and mitigation strategies developed.

The vendor and your organization's project managers should meet routinely throughout the project with cross-functional team members to understand configuration decisions, discuss crossover impact to other areas and monitor progress and budget against the plan. The project manager for your organization needs to be the coordinator of activities between vendor resources, clinical teams, data conversion, integration, hardware, and testing resources.

What happens after the sales cycle?

Typically, after an organization has selected an EMR vendor there is excitement about the upcoming system. There is often little or limited assistance with regard to planning. Usually the contract negotiation process takes longer than anticipated and you feel rushed or excited to begin. EMR vendors will often share with you and follow work plans they created which typically focus heavily on what the vendor needs to do versus the total effort for everyone involved. We find a few vendors who collaboratively project plan

with organizations in development of a single comprehensive project plan. Even fewer vendors routinely document a project charter and communications plan for the implementation.

What Can Happen to Your EMR Project?

So what happens in this scenario? Your organization does not have a clear understanding of the scope of effort, complete project plan or a clear implementation roadmap. You don't understand the logical order of tasks, how your organization can most effectively prepare. The various vendor implementation specialists connect with identified key contacts in your organization and these resources follow their plan or task list to complete configuration of functional areas. You can have multiple application specialists asking for information from many areas of the organization to complete master file and table builds.

The vendor usually has an engagement manager (EM) who is overseeing your implementation. The vendor EM manages the overall effort of the various application specialists and can be the one-team member who understands the big picture surrounding the implementation. Often the individual vendor team members do not have a broad understanding of the overall EMR application or understand other functional application areas.

There tend to be few team members knowledgeable about the whole application and implementation process. You begin to wonder how the various decisions made for configuration work together. How do the decisions affect workflows? Is the vendor defining and documenting future state workflows with clinical areas? Often little attention is paid to this critical area of EMR implementation. You can be left wondering if the infrastructure interfaces, and hardware that is needed will be ready at the right time. If you have an internal leader for your EMR project, they can struggle to comprehend and manage all of the moving parts of the project without a clear and complete

plan and the right tools to manage the project. A well-defined project charter, project plan, and communications strategy are the best way to know your EMR initiative is on time, on budget, and being implemented using best practices.

In conclusion, experience and review of successful EMR implementations point to complete and rigorous project planning and management as crucial to ensure successful implementation of your EMR. Further, building knowledge, skills, and ability in your internal resources is vital for ongoing user support and system maintenance after the implementation is complete. ● ● ●

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